

DIRECTOR'S RECOMMENDATION TO SUPERINTENDENT

DATE: AUGUST 18, 2005

ACTION BY: SCHOOL BOARD MEETING

DEPARTMENT: PURCHASING

DEPARTMENT HEAD: PEDRO FRAGA

SUBJECT: Approval of:

REQUEST FOR PROPOSAL
BID NO. 302
LOBBYSITS - STATE
DISTRICT-WIDE

GIVE RESUME OF BACKGROUND INFORMATION: RATIONALE:

Six responses to the Request for Proposal for Lobbyists, State were received by the specified time of 2:00 P.M. on Wednesday, August 10, 2005.

The committee was composed of Theresa Axford, Brian Barroso, Michael Henriquez, Michael Knowles and Martha Alfonso. After giving notice to the public the committee met on August 15, 2005 at 4:00 P.M. to review all proposals to determine the first, second and third ranked firm. Staff will negotiate a contract with the firm approved by the board. In the event staff is unable to reach a satisfactory agreement with the Board's first approved firm, staff will begin negotiations with the next highest ranked firm as approved by the Board.

First Ranked: Mixon & Associate

Second Ranked: Schoolhouse Consulting

Third Ranked: Florida School Services

IS ITEM BUDGETED: YES x NO

TOTAL COST: WILL BE DETERMINED BY APPROVAL OF THE BOARD.

REVIEWED BY ADMINISTRATION: YES x NO REVIEWED BY ATTORNEY: YES NO xRECOMMENDATION:

The committee recommends that the RFP be awarded to most responsive bid meeting specifications.



District School Board of Monroe County

241 Trumbo Road P.O. Box 1788 Key West, Florida 33041-1788
www.monroe.k12.fl.us

PURCHASING DEPARTMENT
Kathy Rodriguez, Buyer
Phone: 305-293-1400 Ext. 358
Fax: 305-293-1467

July 14, 2005

To All Interested Parties:

You are invited by the District School Board of Monroe County to bid on the following:

Bid No. 302, Lobbyist, State

Bids will be received at the Purchasing Department, 241 Trumbo Road, Key West, Florida 33040 until :2:00 P.M. on August 10, 2005. **Bids will be publicly opened at 2:00 P.M. on August 10, 2005. A meeting to review the bids will convene at a later time.** Bids received after the above-specified time and date will not be considered.

Envelopes must be sealed and clearly marked on the outside "Sealed Bid" with the name of the bid, the bid number, opening date and opening time. All bids must be submitted on the requested format, signed by an authorized agent of the named company.

The School Board reserves the right to waive informalities, to consider any bid which they consider to be in the best public interest, to reject any part of, or any and all bids; alternate bids will be considered. Awards will be made on the basis of the lowest and best bid from the most responsive and responsible bidder.

All bidders will be sent a notice of recommendation of award of bid and notice of award of bid. Successful bidders will be required to have a contract for services approved by the School Board prior to employment.

Sincerely,

Randy Fabal
Director of Purchasing

Attachment

4. Scope of Work

4.1. Purpose, Objectives, and Overview

The School Board of Monroe County (the "School District" or School Board") is seeking to contract with a full time firm to lobby the legislative and executive branches of the Florida state government on the School Board's behalf. The successful Service Provider will actively and continuously lobby the State Legislature, Governor, Cabinet, Commissioner of Education and Florida Board of Education to assist the School Board in several key areas including, but not limited to the following:

- (a) Florida's FEFP program;
- (b) Overall sources of educational funding;
- (c) Florida's educational policy;
- (d) Florida's educational regulations;
- (e) Florida's implementation of NCLB;
- (f) Florida's implementation of Title I;
- (g) Florida's implementation of Title VI;
- (h) Florida's implementation of IDEA and related legislation;
- (i) Housing and Community Development;
- (j) Workforce Development; and
- (k) Other School Board priorities.

The Service Provider will also be responsible for the following:

- (a) Act as the representative on behalf of the School District in Tallahassee, Florida;
- (b) Confer with the School Board, Superintendent and School District staff on planning and program activity that has a bearing on the School District to make the best use of state programs;
- (c) Maintain liaison with the School Board's legislative delegation and assist the delegation in any matter, which the School Board and Superintendent determine to be in the interest of the School District.
- (d) Contact state agencies on the School Board's behalf when applications are under consideration by such agencies and take whatever steps are necessary to obtain favorable consideration of such applications;
- (e) Review state executive proposals, legislation under consideration, proposed and adopted administrative rules and regulations, and other state developments for the purpose of advising the of items that may have a bearing on the School Board's policies and programs;
- (f) Counsel with the School Board regarding appearance by local personnel before Legislative committees and administrative agencies and arrange for appointments and accommodations as necessary;
- (g) Secure and furnish detailed information as may be available on state issues in which the School Board indicates an interest; and
- (h) Review and comment on proposals of the School Board, which are being prepared for submission to state agencies, when requested to do so by the Superintendent;
- (i) Develop and maintain a strong working relationship with FELL, Florida's educational lobbyist's association.

4.2. Successful Service Provider Reporting Requirements

The successful Service Provider shall provide written reports to the Board and Superintendent, or his/her designee, on the first business day of the month. The format and content of the report will be mutually agreed upon.

4.3. Detailed School District Lobbying Needs

- (a) Research and distribute grant information regarding deadlines, competition, and contact with the Superintendent, or his/her designee, prior to grant application by the School District. Keep Superintendent, or his/her designee, apprised of progress, by tracking and legislative coordination following grant application.
- (b) Recommend new sources of funding, particularly discretionary funding.
- (c) Annual project-area visits to stay abreast of development activities.
- (d) Project-specific report preparation for the School District's legislative and to earmark current requests for specific grant needs.
- (e) Pursue grant programs of specific interest to the School District

5. Proposal Format

The School District desires that all Proposals be identical in format to facilitate comparison. Accordingly, it is important that you submit your Proposal in the format described below:

- (a) Cover Letter;
- (b) Executive Summary;
- (c) Background and Experience;
- (d) Specific Methodology and Description of Tasks;
- (e) Staffing and Management Plan
- (f) Use of Subcontractors or Joint Ventures
- (g) Cost Breakdown and Payment Plan
- (h) Certificate of Insurance

All Proposals shall be 8 1/2" x 11" format with all standard text no smaller than 11 points. All original submissions should use one-sided copying and be bound in a three ring binder with tab dividers corresponding to the content requirements specified below. All copies of the proposal shall be one sided copies with tab dividers corresponding to the content requirements specified below, but may be spiral bound or bound with some other secure and permanent form of binding. Failure to follow the required format may result in your organization's Proposal being rejected as non-responsive to this RFP. The School District may exercise that right in their sole discretion. You may, however, reduce the repetition of identical information within several sections of the Proposal by marking the appropriate cross-references to other sections of you Proposal. Appendices for Required Forms, or Technical or Financial information may be used to facilitate Proposal preparation.

5.1. Proposal Content

5.1.1 Questions To Be Addressed

To help the School District compare and assess each Service Provider's Proposal, each Service Provider must answer the following questions in its Proposal. You may answer the questions by referring to other sections of your Proposal, as long as the section referred to specifically answer the questions:

- (a) State your proposed methodology for developing each of the deliverables set forth in Section 4. Scope of Work
- (b) Are there any requirements set forth in Section 4, that you do not propose to meet or that you believe are unnecessary? If so, identify the requirements at issue and state your reasons.
- (c) Conversely, are there any requirements not stated in Section 4, that you believe are necessary or important? If so, identify those requirements and state how you intend to meet them.
- (d) Explain your methodology for identifying, addressing, and resolving any client interests in other projects or independent contacts that may conflict, in any manner, with the interests of the School Board.
- (e) As succinctly as possible, explain any unique attributes, or skills, which may set your company apart from your competitors, with regard to your proposed approach to the Scope of Work, as stated in this RFP.

5.1.2 Executive Summary.

Submit an executive summary outlining your organization's Proposal. The executive summary shall, at a minimum, include an identification of the proposed project team, highlights of this Proposal which make it superior or unique in addressing the needs of the School District, and the proposed price for all Services.

5.1.3 Background and Experience.

Provide a concise description of your organization's background and experience in providing lobbying services, including a response to each question contained in Section 6 of this RFP.

5.1.4 Specific Methodology and Description of Tasks.

Describe in detail how your organization proposes to perform the Services described in Section 4 of this RFP. Also include any information that you would like the Evaluation Committee to consider in applying the evaluation criteria set forth in Section 7 of this RFP, to the extent such information has not been specifically requested in another Section of this RFP.

5.1.5 Staffing and Management Plan.

- (a) Provide background information regarding the staff assigned to this project, their roles and qualifications, emphasizing prior experience with issues pertaining to local municipalities and cities. Also include the depth of personnel at the firm who are qualified to work on the proposed project.
- (b) Provide information regarding the project management abilities of your firm. Include a description of the project management plan for your organization's management of staff assigned to this Project and your firm's ability and plan for managing efficient communication with the School District.

5.1.6 Use of Subcontractors or Joint Venturers.

- (a) If your organization intends to use subcontractors on this project, then you must provide for each of them the information requested in Section 5.1.6(a), and all information required of your organization in the provisions of Subsections 6.1, 6.2, 6.3(a), 6.3(b), 6.4, and 6.6.
- (b) If your organization intends to use joint venture partners on this project, then you must provide for each of them all information required of your organization in the provisions of Section 6.

5.1.7 Cost Breakdown and Payment Plan.

The School District's preferred form of billing is a monthly management fee. Describe your billing methodology, preferred timing, and method of payment. Please submit a price that is inclusive of all retainer fees and ancillary expenses that might be incurred in the course of the engagement. All expenses associated with any lobbying efforts, including but not limited to salaries and benefits, office and other space rental, telephone and other communications equipment and supplies, mail and courier, and advertising shall remain the responsibility of the Service Provider.

5.1.8 Required Forms.

To be deemed responsive to this RFP, Service Providers must complete in detail, all Proposal Forms listed in the solicitation.

6. Proposing Organization's Background and Experience

In order to qualify for award of the Contract, the firm and/or the person(s) assigned to provide services to the School District, must have at least three (3) years of qualifying, direct experience, as determined by the School District, in lobbying at the state level in both the legislative and executive branches of government. The ability to demonstrate successful performance of comparable work for units of local government of similar size and similar priorities will be an important consideration in the selection process. Evidence should be presented that the firm, in general, and the individual(s) assigned to the School District of Monroe account, specifically, have credible and positive working relationships with governor and cabinet, their staff, and state agencies-particularly those with jurisdiction over those areas of interest to the School District. Familiarity with the Members, their offices and staff of the local Legislative delegation, as well as relevant committee (appropriations and authorizations) chairs and their staffs, will also be an important consideration in the selection process. The successful Service Provider will also have demonstrated knowledge of and experience in successfully working with the following processes and agencies:

- (a) The state budget and appropriations process;
- (b) Florida's legislative process;
- (c) The Florida House and Senate and its staff;
- (d) The Board of Education;
- (e) The Florida Department of Education;
- (f) The Florida rule and regulation making process;
- (g) The Florida Department of Health and Human Services;
- (h) FELL; and
- (i) Other School Board priorities.

Please answer the following questions as completely as possible, placing your answer immediately after the question to which it applies. If you wish to add supplemental information, it should be labeled "Supplemental Information."

6.1. Official Name.

Provide the legal name and address of the company and state of incorporation submitting the proposal. Also provide the legal name of all proposed subcontractors or joint venture partners.

6.2. Company Background.

Provide an overview and history of your company. How long has the company been in business? What types of services does the Company perform?

6.3. Proposing Organization's Structure.

- (a) Identify all parent companies, subsidiaries and affiliates of your organization.
- (b) Describe the ownership structure of your organization, including any significant or controlling equity holders.
- (c) Provide a management organizational chart of your overall organization, showing director and officer positions and names and the reporting structure. Provide detailed information for the segments of your organization that would be performing the proposed Services, showing the reporting structures within these segments and among these segments and the overall organization.
- (d) Describe any organizational changes such as divestitures, acquisitions, or spin-offs that have occurred in the latest two (2) years or are anticipated in the future that involve the segment of your organization that would be performing the proposed Services.

6.4. Qualifications of the Firm and Key Individuals.

Describe the qualifications your organization has to conduct the Services requested by this RFP. Describe the key individuals, who would comprise your organization's team for providing the Services requested by this RFP. Include a resume or curriculum vitae for each individual. For each individual identified, state the percentage of his or her time that would be devoted to this project. If you intend to use subcontractors or joint venturers, then you should provide the same information about them that's required for your firm and the individuals on your Project team.

6.5. Key Partnerships.

Describe relationships with members of the legislature, legislative staff, and agency officials, administrative staff, etc. that would indicate your ability to effectively position the School Board to achieve funding and other goals. Offer descriptions of any other resources such as strategic alliances, partnerships, or relationships that would support you in advancing the School District's interests.

6.6. Financial and Legal Considerations.

- (a) Is there, or within the latest three (3) years has there been, any litigation or governmental or regulatory action pending or threatened against your organization that might have a bearing on your ability to provide services to the School Board? If so, identify and describe each such lawsuit or proceeding.
- (b) Identify all lawsuits filed during the past five (5) years in which a business or government customer of your organization has claimed that your organization failed to properly provide any aspect of the type of services requested by this RFP.
- (c) For each entity identified in Section 6.3a, specify the entity's total revenue for each of the past three years, the current number of employees, and any other information that you want the School District to consider in assessing your organization's financial viability and capacity to perform a project of this nature.
- (d) For each entity identified in Section 6.3a, provide documents sufficient for the School Board to verify the entity's financial status, including to the extent available audited financial statements for the past three years, annual reports for the past three years, 10-K reports for the past three years, and the DUNS number.
- (e) Provide any additional financial information that you would like to have the Evaluation Committee consider in evaluating the financial stability of your organization as described in Section 7.4 of this RFP.

6.7. State Lobbying Experience.

- (a) Provide a list of at least five (5) clients for whom you have provided or are providing state lobbying services or related work. For each client, provide the following information: (a) client's name; (b) names, titles, addresses, and phone numbers for contacts at each client; (c) duration of the relationship; (d) types of services provided; (e) primary legislators associated with each client; and (f) the names of all subcontractors. Was your organization the prime contractor?
- (b) Provide a detailed summary of your knowledge and experience in securing funds for public infrastructure or public services through the state appropriation process and through state discretionary grant programs.

6.8. Capacity School District and Project Management.

Describe why the School Board can be confident that your organization has the resource capacity School perform a project of the nature requested by this RFP.

7. Proposal Evaluation Criteria.

An Evaluation Committee comprised of representatives from the School District will evaluate Proposals and select a Service Provider to recommend to the School Board. The criteria described in the following provisions of Section 7 will be used to evaluate the Proposals.

7.1. Competence.

In assessing competence, the Evaluation Committee will consider the various professional, technical, and educational qualifications, experience and achievements of the firm, the individuals proposed for the Project and other individuals within the firm who may provide periodic services.

7.2. Staffing and Project Management Experience.

The Evaluation Committee will assess the perceived ability of the firm to devote the necessary human resources and management attention to the project. Factors that will receive consideration include the number and size of the projects presently being performed by the firm and the proposed assigned staff, and the number and types of projects the firm and its employees have completed; the status of existing projects with respect to completion timetables; the status and level of experience of personnel to be assigned to the project with respect to managing projects on the part of the firm; the firm's and proposed staff's demonstrated ability to realize project budgetary goals, timetables, and quality control objectives; the firm's or the assigned staff's demonstrated ability to bring about a successful completion of similar projects in the past; and the number and type of projects that would be concurrently undertaken by the assigned staff. The Committee will also consider the depth of personnel at the firm who are qualified to work on the proposed project.

7.3. State Lobbying Experience.

The Evaluation Committee will assess the firm's specific experience in undertaking projects similar to the one sought by this RFP. Factors that will receive consideration generally include (a) the number and types of the projects undertaken by the firm that are similar in nature to the scope of work required by this RFP; (b) the degree of similarity of the projects undertaken and the ability of the firm to bring about a successful completion of such similar projects; and (c) the number and quality of references furnished in conjunction with similar projects sought by the School Board.

7.4. Financial Responsibility.

The Evaluation Committee will assess the financial status of the firm and its ability to devote the necessary financial resources to the project. Factors that will receive consideration generally include the capitalization of the firm; the financial information received about the firm, the impact of any recent or foreseen mergers or acquisition; the history of the firm, the corporate structure, and the number of years the firm has been in business; the credit, or industry rating as they relate to financial strength and performance; and any unique risks associated with the firm that would potentially threaten its continued existence as a going concern.

7.5. Unique Attributes.

The Evaluation Committee will assess the firm's unique attributes, which set it apart from its competitors. Factors that will receive consideration include, but are not limited to the following:

- (a) Experience of the personnel assigned to the School Board's account;
- (b) Successful track record in "earmark" appropriations;
- (c) Proposed methodology for interacting with the School District, the legislature/staff, and other relevant entities/persons; and
- (d) Any other "ideas", which distinguish your firm from your competitors.

7.6. Approach and Work Plan.

The Evaluation Committee will assess the overall quality of the Proposal. Factors that receive consideration will generally include the following:

- (a) The firm's performance in converting the Scope of Work into a proposed work plan;
- (b) The detail and clarity of the Proposal in discussing the firm's approach to undertaking the project;
- (c) The firm's performance in identifying any special problems or concerns which may be associated with the project and the preliminary ideas about how these obstacles would be addressed;
- (d) The inclusion of any unique approaches which are designed to save time and money; and
- (e) The firm's demonstrated ability to work with government bodies and a full understanding of applicable laws or regulations that relate to the project.

7.7. Acceptance of Contract Terms.

The Evaluation Committee will evaluate the Proposals for compliance with the terms, conditions, requirements and specifications stated in this RFP.

8. Contracting Requirements.

8.1 Contract Terms and Conditions.

The successful Service Provider will enter in to a Contract with the School Board that contains the terms and conditions set forth in this Section. Each Service Provider must identify in its Proposal by RFP Section number, all terms or conditions included in this Section that it is unable or unwilling to include in the Contract. The Proposal must also include any proposed additional terms or conditions that the Service Provider seeks to include in the Contract. Failure to take exception in accordance with this Section will constitute a legally binding offer on the part of the Service Provider to comply with the terms and conditions proposed herein. The School Board will take any such exceptions and proposed additions into account during the evaluation and selection process. The School Board may propose additional terms and conditions, based on the responses to this RFP, and the School Board's analysis of the successful Service Provider's proposal. As used in this Section of the RFP, the term "Company" shall refer to the successful Service Provider.

8.2. Description of Services.

The Contract will set forth the Services to be provided in detail. The Services will include those described in this RFP, the Company's Proposal and any modifications agreed to by the parties.

8.3. Compensation.

The School District will pay all properly submitted, uncontested invoices within thirty (30) days of receipt. Proposals may include an incentive discount for early payment. Invoices must include state and local sales tax, if applicable.

8.4. Removal, Replacement and Promotion of Company Personnel.

The School Board will have the right to require the removal and replacement of any personnel of the Company or the Company's subcontractors who are assigned to provide Services to the School Board. The School Board shall be entitled to exercise such right in their sole discretion by providing written notice to the Company. The School Board must approve in writing any hires or transfers of personnel to "Key Personnel" positions on the Project, and the School Board shall have the right to interview all personnel that the Company proposes to hire or transfer to such positions. As used in this Agreement, the term "Key Personnel" shall mean the Company Project Manager, and any other personnel of the Company or its subcontractors who are identified as Key Personnel in an Exhibit to the Agreement, or whom the School Board from time to time reasonably designate in writing to the Company as fulfilling a key role in the Project. Unless approved by the School District in writing, the Company will not: (a) remove the Company's Key Personnel from the Project or permit its subcontractors to remove Key Personnel from the Project; or (b) materially reduce the involvement of the Company's Key Personnel in the Project or allow its subcontractors to materially reduce the involvement of Key Personnel in the Project. Failure to receive approval from the School Board prior to removal or replacement of Key Personnel, shall be grounds for termination of the Contract.

The Company will replace any personnel who leave the Project with equivalently qualified persons. The Company will replace such personnel as soon as reasonably possible, and in any event within thirty days after the Company first receives notice that the person will be leaving the Project.

As used in this Agreement, the term "personnel" includes all staff provided by the Company or its subcontractors, including but not limited to Key Personnel.

8.5. Company Project Manager.

The duties of the Company Project Manager include, but are not limited to the following:

- 8.5.1. Coordination of service schedules and the Company's resource assignment;
- 8.5.2. Management of the overall service by monitoring and reporting on the status of the services and actual versus projected progress, and by consulting with the School Board's Project Managers when deviations occur and by documenting all such deviations;
- 8.5.3. Provision of consultation and advice to the School Board on matters related to Lobbying Services, key decisions and approaches, and services concerns/issues and acting as a conduit to the Company's specialist resources that may be needed to supplement the Company's normal project staff;
- 8.5.4. Acting as the Company's point of contact for all aspects of Contract administration, including invoicing for services, and status reporting;
- 8.5.5. Facilitation of review meetings and conferences between the School District and the Company's executives when scheduled or requested by the School District;
- 8.5.6. Communication among and between the School District and the Company's project staff; and

8.5.7. Promptly responding to the School Board's Project Managers when consulted in writing or by E-mail with respect to work plan deviations and necessary documentation.

8.6. School District's Project Managers.

The duties of the School Board's Project Manager(s) are to:

- (a) Coordinate the School District's resource assignment as required to fulfill the School Board's obligations pursuant to the Contract;
- (b) promptly respond to the Company's Project Manager when consulted in writing or by e-mail with respect to information needs or service issues; and
- (c) Act as the School Board's point of contact for all aspects of the Services, including contract administration and coordination of communication with the School Board's staff. The School District shall be allowed to change staffing for the School Board's Project Managers position on three- (3) business day's notice to the Company.

8.7. Monthly Project Status Meetings.

The Company must meet at least once each month with the School Board's Project Managers to discuss progress on the Project.

8.8. General Warranties and Representations.

Company will represent and warrant in the Contract that:

- 8.8.1. It is a corporation duly incorporated, validly existing and in good standing under the laws of the State of _____, and is qualified to do business in Florida;
- 8.8.2. It has all the requisite corporate power and authority to execute, deliver and perform its obligations under the Contract;
- 8.8.3. The execution, delivery, and performance of the Contract have been duly authorized by Company;
- 8.8.4. In connection with its obligations under the Contract, it shall obtain all applicable permits and licenses; and
- 8.8.5. The Company shall not violate any agreement with any third party by entering into or performing the Contract.

8.9. Additional Representations and Warranties.

Company represents, warrants and covenants that:

- 8.9.1. The Services shall satisfy all requirements set forth in the Contract, including but not limited to the attached Exhibits;
- 8.9.2. All work performed by the Company and/or its subcontractors pursuant to the Contract shall meet industry accepted standards, and shall be performed in a professional and workmanlike manner by staff with the necessary skills, experience and knowledge;
- 8.9.3. The Services provided by the Company under the Contract will not infringe or misappropriate any patent, copyright, trademark or trade secret rights of any third party; and

8.9.4. The Company has taken and will continue to take precautions sufficient to ensure that it will not be prevented from performing all or part of its obligations under the Contract by virtue of interruptions in the computer systems used by the Company.

8.9.5. In accordance with the Florida electronic data-processing records law, Florida Statutes Chapter 119, Public Records:

(a) All software and related documentation (if any) provided by the Company or its subcontractors under the Contract will have sufficient information and capabilities to enable the School District to permit the public inspection and examination and to provide electronic copies of public records stored, manipulated or retrieved by such software; and

(c) All software and documentation (if any) provided by the Company or its subcontractors will have sufficient information to enable the School District to create an index containing the following information with respect to each database used by the software without extraordinary commitments of staff or resources: (i) annotated list of data fields: name, description, and restricted field indicator; (ii) description of the format or record layout; (iii) frequency with which the database is updated; (iv) list of any data fields to which public access is restricted; (v) description of each form in which the database can be copied or reproduced; (vi) title of the database; (vii) owner of the data; (viii) narrative description of the database; (ix) person creating the index; and (x) purpose of the database.

BID CONDITIONS
LOBBYISTS - STATE
BID NO. 302

1. The Monroe County School System reserves the right, at its sole discretion, to accept or reject any and all bids and to waive informalities or irregularities when it is in the best interest of the Board to do so.
2. The Board reserves the right to award the bid on a line item basis or all or none basis.
3. Prices quoted shall remain firm for a period of not less than 365 days after bid opening.
4. Bids shall be prepared in the quantity and format required, signed by the bidder or his designated representative and submitted in a sealed envelope marked on the outside as follows.

SEALED BIDS

SUBJECT:	LOBBYIST - STATE
BID NO.:	302
OPENING DATE:	AUGUST 10, 2005
TIME:	2:00 P.M.

5. Bid Withdrawal – A bidder may withdraw a bid before the designated time for opening bids by submitting a written request to the Director of Purchasing and identifying the reason (s) for the desired bid withdrawal. A bidder shall not be permitted to withdraw a bid for any reason after the designated time for opening bids without School Board approval.
6. Any person who is adversely affected by the District's decision or intended decision concerning a bid solicitation or a contract award shall file with Superintendent a written notice of protest within seventy-two (72) hours after receipt of notice of the decision or intended decision. Saturdays, Sundays and legal holidays shall be excluded in the computation of the 72-hour time periods. The formal written protest shall be submitted by the person within ten (10) days after filing the notice of protest. Failure to file a formal written protest shall constitute a waiver of proceedings under Chapter 120, Florida Statutes. A protest is officially filed when it is received in this Purchasing Department. The formal written protest shall contain the following: (a) name, address, and file or identification number, if known, of the affected agency. (b) Name and address of the affected party (c) a state of the ultimate facts upon which the protest is based: and, (d) such other information as deemed relevant the issue.

NOTICE TO BIDDERS: Failure to file a protest within the time and manner prescribed in the School Board rule entitled "Resolution of Protests From Contract Bidding Process" (File: DJE) shall constitute a waiver of any further right to protest such bid award. The protestor shall be required to post a bond amounting to:

- 1) Twenty-five thousand dollars or 2 percent of the lowest accepted bid, whichever is greater, for projects valued over \$500,000; and
- 2) Five percent of the lowest accepted bid for all other projects, conditioned upon payment of all costs and fees, which may be adjudged against the protestor in the administrative hearing. If at the hearing the School Board prevails, it shall recover all costs and attorney's fees from the


protestor; if the protestor prevails, the protestor shall recover from the School Board all costs and attorney's fees.

7. Persons convicted of a crime of moral turpitude; any felony; or any offense related to child abuse or child dependency shall not be used by contractor in performing services or providing products pursuant to a bid award or a contract executed pursuant to a bid award. Such persons shall not be permitted upon school premises or property owned by, or under the control of the School Board.
8. A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to the public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.
9. Civil Right Compliance – The Contractor certifies it is in compliance with the Office for Civil Rights requirements with respect to nondiscrimination on matters related to race, sex, handicap or age and the contractor further agrees that it shall not discharge; fail or refuse to hire; limit, segregate, or classify employees or applicants for employment opportunities or adversely affect any individual status as an employee; or otherwise to discriminate against any individual with respect to compensation, terms conditions or privileges of employment, because of such individual's race, color, religion, sex, national origin, age, handicap or marital status except as may otherwise be provided by law or as a result of bona fide occupational qualification reasonably necessary for the performance of the particular employment.
10. Federal Law Compliance – The Contractor certifies it is in compliance with applicable provisions of the Civil Rights Act of 1964; Title IX of the Education Amendments Act of 1974; Section 504 of the Rehabilitation Act 1973; The Individuals With Disabilities Education Act; and the Immigration Reform Act of 1986, all as may be amended from time to time.
11. Compliance with State Law and Regulations – The Contractor will comply with and abide by the requirements of Florida School Code and The Florida Administrative Code, as applicable and appropriate, in regards of the provision of Services; generating, maintaining and submission of all reports and records; and compliance with professional licensing requirements of staff members.
12. Certification regarding debarment, suspension, ineligibility and voluntary exclusion (form AD-1048 (1/92) must be returned with bid documents. (Food Service/Federal Grants over threshold of \$25,000.00/yr.)


IN WITNESS WHEREOF, the parties have executed this Contract on this 22nd day of
September, 2005.


SIGNATURE OF CHAIRPERSON OF THE BOARD
EILEEN QUINN

9/22/05
DATE


SIGNATURE OF SUPERINTENDENT
RANDY ACEVEDO

9/22/05
DATE


SIGNATURE OF SCGI REPRESENTATIVE
DATE 9/30/05

Vernon A. Pickup - Counsel, Pres. & Controller
PRINT NAME AND TITLE

MINUTE BOOK # _____
PAGE # _____

EXHIBIT "A"

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• Resume' – Vernon A. Pickup-Crawford	
• Resume" – Patricia O'Connell	
• Resume' – Ron LaFace, Jr.	
• Identical Tie Bid – Signed Copy	
• 2004 Corporate Income Tax Return – SCGI	

Schoolhouse Consulting Group, Inc.

792 Lemongrass Lane * Wellington, FL 33414 * (561) 644-2439 * Fax: (561) 798-9948
Email: vacrawford@msn.com Website: www.schoolhouseconsulting.com

August 8, 2005

Randy Fabal
Director of Purchasing
District School Board of Monroe County
241 Trumbo Road
P.O. Box 1788
Key West, FL 33041-1788

Dear Mr. Fabal:

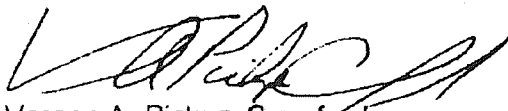
I am pleased to have this opportunity to submit a response to Bid No. 302, Lobbyist, State.

Enclosed you will find the original plus five copies of our proposal in accordance with the district's guidelines.

The proposer and subcontractors bring a collective 44 years' of Tallahassee lobbying experience to the District School Board of Monroe County for consideration. We have extensive school district background as well as having worked with both the legislative and executive branches of Florida government.

On our joint behalf, I look forward to hearing from you and having an opportunity to discuss our proposal further. We hope to establish a professional relationship that results in enabling the district to enhance and increase its programs.

Sincerely,



Vernon A. Pickup-Crawford
President and Consultant

Vapcl

Encl

B. Executive Summary

Schoolhouse Consulting Group, Inc., (SCGI), the contract proposer, and its proposed subcontractor, Capital City Consulting, LLC, have several qualities that make this proposal unique in meeting the needs of the District School Board of Monroe County. The proposed project team manager is a native of South Florida and has over 33 years' experience working with south Florida school districts, notably Palm Beach County, a district that shares many of the same issues that Monroe faces legislatively and educationally. Through efforts of organizations such as the Consortium of South Florida School Boards and the Florida School Boards Association, the proposer has a strong working knowledge of Monroe County concerns and has worked with Monroe County legislative delegation members on numerous issues that were of common importance. The representation by the proposer of three (Collier, Indian River and Palm Beach) of the seven districts in the South Florida Consortium lends collaborative continuity and support to Monroe district issues.

The subcontractor, Patricia O'Connell, has served as executive staff director for the Commissioner of Education from 1990 to 1994. She has 22 continuous years of experience in Tallahassee. Her partner, Ron LaFace, Jr., has spent the last three years working on education issues ranging from charter school accountability to district cost differential.

Services to be provided by SCGI and its subcontractors:

- Coordination with the Board, Superintendent and designated staff in the development, preparation and pursuit of legislative issues for 2006, both federal and state, for School Board approval and dissemination;
- Assistance with district representatives on joint legislative issues prior to and/or after the regular Florida Legislative session in 2006. Such meetings can include pertinent issues for federal Congressional Delegation members;
- Copies of the "Know Your Legislator" booklet for Board Members, Superintendent and designated staff;
- Periodic written and verbal reports to Board Members and Superintendent including a tracking chart of all bills potentially affecting PreK-12 education updated bi-weekly before the session and weekly during the session with a wrap-up upon adjournment;
- Distribution of "FYI's" from sources available to SCGI concerning state and related federal issues to Board Members and the Superintendent on a routine basis;
- Arrangement of meetings as requested by Board Members and staff with individual legislators in Tallahassee during the session and pre-session committee meetings;
- Wrap-up session on results of 2006 regular Florida session and 109th Congress, (2005-6);
- "24/7" availability for questions/input on issues during 2006 Florida Legislative session; and

Tab C

Background and Experience

Vern Pickup-Crawford has 34 years experience in Florida public education, 19 of which include work as legislative liaison at the local, state, and federal levels, beginning in 1974. Mr. Pickup-Crawford is fully experienced in the requirements of the "Scope of Work," having identified and prepared legislative proposals, tracked issues, and advocated and obtained legislative approval on both statutory and appropriations issues for the public school district clients whom he represents. He also has extensive background in central school district operations, both in public affairs and in instructional support services. He was the first individual to receive the Florida School Boards Association's Service Award to a non-school board member in 1982. He is a member and past president of the Florida Education Legislative Liaisons (FELL). He is a member of the AASA Legislative Corps on federal legislation and has served as a district representative to the South Florida School Boards Consortium and Florida School Boards Association consecutively since 1996.

Mr. Pickup-Crawford has worked with the Florida Education Finance Program since its inception in 1973 and with state budgeting processes throughout the previously listed dates. He works jointly with Ms. O'Connell and Mr. LaFace on Palm Beach School District issues. He has lobbied successfully for other client school districts on numerous issues. He has kept the Palm Beach Education Foundation apprised of legislative issues and opportunities through his representation of the school district. He has developed and guided various legislative appropriations issues through legislative and administrative processes.

Pat O'Connell has more than 22 years experience providing legislative services representing public and private sector entities, including having served the educational interests of the State Department of Education and Palm Beach School District. As lead lobbyist for DOE and the Attorney General's Office, as well as a private sector lobbyist, Ms. O'Connell is thoroughly experienced in the requirements of the "Scope of Work," including providing advocacy, advice, analysis, and strategic direction. In addition, she has experience in drafting legislation, handling budgetary matters, and organizing coalitions and advocacy groups.

Ms. O'Connell has lobbied for the entire state education budget for approximately six years as chief lobbyist for DOE. As Executive Staff Director, she also supervised the state Business and Community Partnership Program, which provided financial support to schools. Representing Palm Beach School District, Harcourt School Publishers, Harcourt Assessment, and New College of Florida, She has coordinated the development of education appropriations categorical requests and successfully pursued that funding through the Governor's approval process. Ms. O'Connell and Mr. Pickup-Crawford have partnered in representing Palm Beach County for the last nine (9) years, she as the Tallahassee-based lobbyist and he as the primary district contact and lobbyist in Tallahassee when the Legislature has meetings.

Ron LaFace, Jr. has advocated on behalf of and assisted clients before all facets of Florida Government as a private lobbyist for the past 3 years. Before

The proposer and subcontractors work closely with the executive branch including the Governor's staff for education policy, the Commissioner of Education and members of his staff.

The proposer and subcontractors also work closely with the education community, predominantly the Florida Association of District School Superintendents, Florida School Boards Association, and the South Florida School Boards Consortium. All three individuals are members of the Florida Education Legislative Liaisons (FELL) and, as previously noted, Mr. Pickup-Crawford is a past-president (2001-2002)

As the need arises, the proposer and subcontractors also work with the Florida League of Cities, Florida Association of Counties, Florida Education Association and other statewide organizations on specific issues.

(6.6) Financial and Legal Considerations

- (a) No;
- (b) There have not been any such lawsuits;
- (c) SCGI was formed in late 2003. Revenue for 2004: \$142,483; receivables for 2005 to date: \$196,000. Prior to 2003, Mr. Pickup-Crawford served on staff as legislative liaison for the Palm Beach School District (see 6.4);
- (d) The only available documentation is the 2004 IRS corporate income tax return, attached under "Supplemental Information", Tab I.
- (e) Schoolhouse Consulting Group, inc., is a growing firm having over a 33% increase in revenues over last year; Neither the firm nor its principal has ever had any financial sanctions or difficulties.

(6.7) State Lobbying Experience

- A1. (a). School District of Palm Beach County, FI
- (b). Gerald A. Williams, Esq.
Chief for Administration
3300 Forest Hill Blvd., Ste. C316
West Palm Beach, FI 33406
Phone: (561) 434-8734
- (c). As principal of SCGI, since 2004; as district employee,
As district staff, 19 years originally starting in 1975;
- (d). local, state and federal government relations
- (e). Governor's office; Commissioner of Education; House and Senate leadership and committee members/staff; Palm Beach County Legislative Delegation; Palm Beach County Congressional Delegation;
- (f). SCGI is school district lead contractor with Capital City Consulting as second contractor to the district.
- A2. (a). School District of Collier County, FI
- (b). Dr. Rozalyne P. Wright
Executive Assistant to the Superintendent
5775 Osceola Trail
Naples, FI 34109

- A6. (a). School District of Okeechobee County, Fl
(b). Dr. Patricia Cooper
Superintendent
700 SW 2nd Avenue
Okeechobee, Fl 34974
(863) 462-5000
(c) One year
(d). State legislative issues common to five-county region*
(e). Governor's Office, Commissioner of Education, House and Senate leadership and committee members/staff, Okeechobee County Legislative Delegation;
(f). SCGI is sole contractor.

- SCGI has individual contracts with each of these districts for the preparation and legislative pursuit of issues identified as common to Indian River, Martin, Okeechobee, St. Lucie and Palm Beach counties, who comprise the Treasure Coast region.

B. Areas of Knowledge and Experience:

Reference is made to section (6.4) of this proposal. As examples, Proposer and subcontractors were directly or indirectly responsible for the following:

- Establishment of the 2.0-mill capital outlay authority in 1980;
- Assistance to SFSBC to preserve the 3-year rolling average of the District Cost Differential and FPLI structure prior to 2004's FPLI/a change;
- Amendment in 2005 (SB388) to allow districts having passed a bond or sales tax referendum to levy the .25-mill discretionary rate up to \$100/FTE;
- Assistance toward full funding for instructional materials categorical;
- Assistance for Senate appropriation of \$20 million in 2005 (SB422) for hurricane hardening of schools (later dropped out in conference and did not pass);
- Limitation of the .51-mill discretionary "equalization" in 2005 to \$56 million from the original \$96 million sought by numerous other districts;
- Assistance to FADSS et al in reducing proposed FLDOE guideline requirements to give districts greater flexibility in implementing secondary reading grants for FY2006;
- Assistance to maintain district 5% administrative fee for charter school operations;
- Assistance to FSBA et al for Senate position on ½ sales tax without referendum for school districts as part of 2005 proposed growth management legislation;
- Exemption for PB County from growth management concurrency legislation based on district having the only state-adopted plan as of March, 2005;
- "No Strings Attached" legislation that allows districts to fold instructional technology and certain other categorical funds into the Base Student Allocation (FEFP) for greater district flexibility.

Tab D

Specific Methodology and **Description of Tasks**

June, 2006 - Complete review of 2006 session for implementation, planning for FY2007.

*Preliminary means initial set of recommendations which can be modified, deleted or added to at any time through the last week of the 2006 Session.

E. Staffing and Management Plan

- (a) Background information concerning the project team of the proposer, Vern Pickup-Crawford of Schoolhouse Consulting Group, Inc., and subcontractors Patricia O'Connell and Ron LaFace, Jr., of Capital City Consulting, LLC, is provided under sections (6.4) and (6.7B) under Tab C.
- (b) Mr. Pickup-Crawford will be responsible for project coordination between the proposer and subcontractors and the district. He will serve as primary contact with the school district and will handle or assign the handling of day-to-day tasks. Ms. O'Connell and Mr. LaFace will be responsible for follow-through and researching relevant information as well as working with legislative staff and others on any statutory language development or amendment on behalf of the district. All three individuals will register as lobbyists for both the Executive Branch and the Florida Legislature with Mr. Pickup-Crawford as lead (meaning the district designee will be required to sign his registration and semi-annual expense forms as required by law or rule).

F. Use of Subcontractors or Joint Ventures

As noted elsewhere in this bid, Schoolhouse Consulting Group, Inc., plans to subcontract for the services of Capital City Consulting, LLC—specifically Patricia O'Connell and Ron LaFace, Jr.—to pursue the legislative goals and priorities of the District School Board of Monroe County. Should the need arise to do so, we will consult with the School Board's designee concerning any change of subcontracting firm or individual to this arrangement.

G. Cost Breakdown and Payment Plan

For the scope of services described within this proposal, a fee of \$45,000 is proposed, payable in equal monthly increments, to Schoolhouse Consulting Group, Inc. The first payment would be billable and due upon acceptance of a contract and the last due in the month of June, 2006 (for example, if agreement is effective in September, 2005, payment would be in ten (10) equal payments of \$4500) with invoices drawn against a purchase order issued for the full amount and payment slated for the 15th of each month. This fee is all inclusive except if the occasion arises wherein the district wishes services in addition to those listed in this Bid. Claims bills are not included in this fee.

H. Certificate of Insurance

Should Schoolhouse Consulting Group, Inc., be recommended for award of Bid No. 302, Lobbyist, State, SCGI will provide, through Beacon Insurance in Boca Raton, Fla., a binder and necessary form attesting that the requirements of "Contractor Insurance Requirements" have been met. Please note that, as previously indicated, SCGI is a Florida "S-Corporation" and is governed accordingly by state law for liability and compensation.

Resume'

Vernon A. Pickup-Crawford

Objective: Marshall resources for public education that contribute to the graduation of students as productive citizens.

Education Degrees: M.Ed. summa cum laude, Administration & Supervision, Fla. Atlantic University
B.A. with Honors, Classical Studies, Florida State University

Professional Experience:

Schoolhouse Consulting Group, Inc.

- President and Consultant, December, 2003 – present

Consulting firm representing interests of K-12 school districts and education-related interests of other organizations, public and private; legislative liaison activities at local, state and federal levels; facilitation of education issues among organizations.

School Board of Palm Beach County

- Chief Legislative Liaison, 1973-84 and 1997-2003

Developed, prepared and pursued Board-approved legislative programs at state and federal levels;

- Public Information Officer, 1973-1984
- Director, Instructional Support Services, 1982-2000
- Director, Board Policy & Business Partnerships, 2000-2003

Nova University

- Adjunct Instructor, "School Law and Legislative Process," 1983-1985

Leon County School Board

- Teacher, Godby High School, Latin/Mythology, 1970

Broadcasting

- News Director, WJNO Radio, West Palm Beach, 1971
- News Director, WTNT/WOMA Radio, Tallahassee, 1967-1970

PATRICIA G. O'CONNELL

Qualifications:

Experienced in direct negotiation with key legislative leadership and executive branch. Able to coordinate complex issues from developmental stage through final passage. Skillful in consensus-building among groups with diverse interests.

Professional Experience:

Partner, Capital City Consulting, L.L.C.
Tallahassee, FL

January 2003—

Owner of four partner lobbying firm, representing interests of public and private sector clients specializing in budget issues and substantive legislation for educational entities, pharmaceutical manufacturing, insurance and publishing

Senior Governmental Consultant
Katz, Kutter, Alderman, Bryant & Yon
Tallahassee, FL

1994-2003

Responsible for coordination and direction of legislative and agency representation of key firm clients including publishing, technology, and managed health care entities

Executive Staff Director, Office of the Commissioner
Florida Department of Education

1990-1994

Responsible for coordination, development and passage of all major education legislation affecting public schools, including \$8 Billion annual appropriation.
Responsible for management of public private partnerships, interagency coordination and federal affairs

Director, State and Federal Relations
Florida Department of Education

1987-1990

Chief Lobbyist for the Department before the state legislature and manager of the Washington, DC Office

Staff Director, Majority Office
Florida House of Representatives

1986-1987

Coordinated support for Speaker's major legislative issues, including member training and support

Ron C. LaFace Jr.

Qualifications:

Experienced in drafting, negotiating and passing complex legislation, including experience with funding for education interests as well as health care, education policy, insurance, banking, construction, building codes, and other business related interests.

Professional Experience:

Partner, Capital City Consulting, L.L.C.

January 2003—present

Owner of four partner lobbying firm, representing interests of public and private sector clients specializing in budget issues and substantive legislation for educational entities, pharmaceutical manufacturing, Healthcare, construction, insurance, and publishing

Associate, Katz Kutter Alderman Bryant and Yon, P.A.

2001-2002

Responsible for legal services for clients in the insurance regulatory and government practice areas. Represented the Secretary of State in election disputes for the 2002 general election. Also responsible for general government relations for clients including development of legislative strategy, client relations, drafting legislation, and monitoring issues of importance to clients.

Investigator, Florida Department of Education

1998-2000

Responsible for investigating allegations of teacher misconduct and making licensing recommendations to the Commissioner of Education.

Education:

Florida State University College of Law

Juris Doctor, April 2002

Magna Cum Laude

Tallahassee, FL

University of Florida

Bachelor of Arts, History, May 1998

Gainesville, FL

Appointments:

Florida Postsecondary Education Planning Commission
President, Florida Blue Key Leadership Honorary

Form 1120S

U.S. Income Tax Return for an S Corporation

OMB No. 1545-0130

Do not file this form unless the corporation has timely filed
Form 2553 to elect to be an S corporation.

2004

Department of the Treasury
Internal Revenue Service

See separate instructions.

For calendar year 2004, or tax year beginning

and ending

Effective date of S election 8/29/03	Use the IRS label. Otherwise, print or type.	Name Number, street, and room or suite no. (If a P.O. box, see page 12 of the instr.) Schoolhouse Consulting Group, Inc 792 Lemongrass Ln City or town, state, and ZIP code Wellington FL 33414	C Employer identification number 20-0210864 D Date incorporated 8/29/2003 E Total assets (see page 12 of instructions) \$ 38,811
F Business code number (see pages 16-18 of the instr.) 541600			

F Check applicable boxes. (1) ☐ Initial return (2) ☐ Final return (3) ☐ Name change (4) ☐ Address change (5) ☐ Amended return

G Enter number of shareholders in the corporation at end of the tax year 1

Caution: Include only trade or business income and expenses on lines 1a through 21. See page 13 of the instructions for more information.

Income	1a Gross rept or sales	142,483	b Less rtn and allowances		c Bal	1c	142,483
	2 Cost of goods sold (Schedule A, line 8)					2	
	3 Gross profit. Subtract line 2 from line 1c					3	142,483
	4 Net gain (loss) from Form 4797, Part II, line 17 (attach Form 4797)					4	
	5 Other income (loss) (attach schedule)					5	
	6 Total income (loss). Add lines 3 through 5					6	142,483
Deductions (see page 14 of the instructions)	7 Compensation of officers					7	54,000
	8 Salaries and wages (less employment credits)					8	
	9 Repairs and maintenance					9	
	10 Bad debts					10	
	11 Rents					11	
	12 Taxes and licenses					12	4,602
	13 Interest					13	1,631
	14a Depreciation (attach Form 4562)	14a	11,356			14c	11,356
	b Depreciation claimed on Schedule A and elsewhere on return	14b					
	c Subtract line 14b from line 14a						
	15 Depletion (Do not deduct oil and gas depletion.)					15	
Tax and Payments	16 Advertising					16	
	17 Pension, profit-sharing, etc., plans					17	
	18 Employee benefit programs					18	
	19 Other deductions (attach schedule)					19	53,289
	20 Total deductions. Add the amounts shown in the far right column for lines 7 through 19					20	124,878
	21 Ordinary business income (loss). Subtract line 20 from line 6					21	17,605
	22 Tax: a Excess net passive income tax (attach schedule)	22a				22c	
b Tax from Schedule D (Form 1120S)	22b						
c Add lines 22a and 22b (see page 18 of the instructions for additional taxes)							
23 Payments: a 2004 estimated tax payments and amount applied from 2003 return	23a				23d		
b Tax deposited with Form 7004	23b						
c Credit for Federal tax paid on fuels (attach Form 4136)	23c						
d Add lines 23a through 23c							
24 Estimated tax penalty (see page 18 of instructions). Check if Form 2220 is attached					24		
25 Tax due. If line 23d is smaller than the total of lines 22c and 24, enter amount owed.					25		
26 Overpayment. If line 23d is larger than the total of lines 22c and 24, enter amount overpaid					26		
27 Enter amount of line 26 you want credited to 2005 estimated tax					27		

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer Vernon Pickup-Crawford Date 1/14/05

Preparer's signature [Signature] Date 1/14/05 Check if self-employed ☐ Preparer's SSN or PTIN P00438599

Firm's name (or yours if self-employed) Debra A. Erickson, P.A. EIN

Address, and ZIP code 8819 North Virginia Avenue Palm Beach Gardens, FL 33418 Phone no. 561-626-7650

BID NO.:

BID NO. ~~202~~ 302PROJECT TITLE: LOBBYISTS - ~~State~~ State

FIRM NAME	COMPETENCE	STAFFING & PROJECT MANAGEMENT EXPERIENCE	FEDERAL LOBBYING EXPERIENCE	FINANCIAL RESPONSIBILITY	UNIQUE ATTRIBUTES	APPROACH AND WORK PLAN	ACCEPTANCE OF CONTRACT TERMS	TOTAL:
	0-20	0-15	0-20	0-20	0-5	0-10	0-10	100
Mixon & Associate								87.2
Schoolhouse Consulting								77.4
FL School Services								76.8
Emergent Design								75.8
Horne Group								45.8 *
Colodny Albert P.H.								44.6 *

Selection Committee Signatures: * Did not submit Financial Responsibility

Cherem Arfene
Signature

Signature

Brian L. D'Amico
Signature

Signature

W. J. Frank
Signature

Signature

Michael Miller
Signature

Signature

Martha Alfonso
Signature

Signature

8/15/05 5:30 P.M.

BID NO.:

BID NO. 299

2

PROJECT TITLE: LOBBYISTS - ~~State~~ State

FIRM NAME	COMPETENCE	STAFFING & PROJECT MANAGEMENT EXPERIENCE	FEDERAL LOBBYING EXPERIENCE	FINANCIAL RESPONSIBILITY	UNIQUE ATTRIBUTES	APPROACH AND WORK PLAN	ACCEPTANCE OF CONTRACT TERMS	Cost	TOTAL:
	0-20	0-15	0-20	0-20	0-5	0-10	0-10		100
① Mixon + Ass.	18	15		20	4	10	10	36,000 per yr.	77
② School House Consulting	15	12		15	4	8	10	4500 for 10 mos.	64
Emergent Design	15	11		10	5	8	10	2000 per month + travel	59
Colodny, Fass	10	10		NA	0	5	10	5000 per month	35
Horne Group	10	5		NA	0	5	10	4000 per month	30
③ Florida School Serv.	10	12		10	4	8	10	3400 Contract	54
									76.8

Selection Committee Signatures:

Theresa Ayala
Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

BID NO.: BID NO. 302
PROJECT TITLE: LOBBYISTS - STATE

FIRM NAME	COMPETENCE	STAFFING & PROJECT MANAGEMENT EXPERIENCE	FEDERAL LOBBYING EXPERIENCE	FINANCIAL RESPONSIBILITY	UNIQUE ATTRIBUTES	APPROACH AND WORK PLAN	ACCEPTANCE OF CONTRACT TERMS	Cost / Based @	TOTAL:
	0-20	0-15	0-20	0-20	0-5	0-10	0-10		100
MIXON & ASSOCIATES	9 school Dist.	30 years	TEN school Dist.	700+	SARASOTA 100 mill	Appendix B		3M	95
(SCBI)	19	15	19	18	5	9	10	TALL.	
Schoolhouse CONSULTING GROUP	33 years w/ SOUTH FLORIDA	SUB ?	44 years	142+	EXPERIENCE w/ school boards	SUBCONTRACT P.O. CONTRACT		45M	85
	18	13	17	16	5	8	8	WELLS	
EMERGENT DESIGN & DEVELOPMENT	Small But knowledgeable.	DR. O'FARRELL 27 yr	DR. ONLY maybe not enough	376+	SPECIALIST	1-4		2.21M	81
	15	14	16	18	4	7	7	TALL.	
(FSS)	Service Admin. 2 U.S. Legislators	30 years w/ School Board INFLUENTIALLY	SCHOOL BOARD MIAMI/DADE	177+	GLENN/ARLE HANSEN/QUEZ	PAGE 14		2.5 3 year	87
FLORIDA SCHOOL SERVICES, INC.	18	14	18	17	5	9	6	TALL MIAMI	
ABATE P.A.	AVERAGING	25 years M. Cotnam	School Board OF Broward County	N.A.?	3	3 persons		3.5M	55
COLONY, FASS, TALENFELD, KAR.	16	13	17	0	3	6	0	TALL Ft. LA.	
THE HORNE GROUP	BUSH / HORNE mckay	MONTHS DEPT. OF ED	KLC / FO. SEAVERS OF AMERICA	N.A.	CONNECTED	EXEC. SIMM		4M	65
	20	15	18	0	5	7	0	FLORIDA	

Location & Cost
Should have been
considered a factor!

Selection Committee Signatures:

Brian L. Barrow
Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

BID NO.:

BID NO. 200

02

PROJECT TITLE: LOBBYISTS -

State

FIRM NAME	COMPETENCE	STAFFING & PROJECT MANAGEMENT EXPERIENCE	FEDERAL LOBBYING EXPERIENCE	FINANCIAL RESPONSIBILITY	UNIQUE ATTRIBUTES	APPROACH AND WORK PLAN	ACCEPTANCE OF CONTRACT TERMS	TOTAL:
	0-20	0-15	0-20	0-20	0-5	0-10	0-10	100
Mixon 36,000 1990	18	14	18	20	4	8	8	90
Schoffele 45,000 2003	16	12	16	16	3	7	7	77
Emergent 24,000 1999	16	12	16	16	3	8	7	78
PLA. School Ser. 30,000 1996	16	14	17	16	3	8	7	81
cd day 60,000 1976	15	12	12	10	2	5	0	46
Horn 40,000 2005	18	12	13	10	3	6	0	52

Selection Committee Signatures:

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

BID NO.:

BID NO. 22

PROJECT TITLE:

LOBBYISTS -

State

FIRM NAME	COMPETENCE	STAFFING & PROJECT MANAGEMENT EXPERIENCE	FEDERAL LOBBYING EXPERIENCE	FINANCIAL RESPONSIBILITY	UNIQUE ATTRIBUTES	APPROACH AND WORK PLAN	ACCEPTANCE OF CONTRACT TERMS	COS	TOTAL:
	0-20	0-15	0-20	0-20	0-5	0-10	0-10		100
Horne Group	16	15	10	0	4	10	10	45,000	55
EDD	20	19	20	20	4	8	10	4,000 + travel	91
FL School Services	20	8	19	20	4	8	10	30,000 3,000	89
Colodny, FASS	10	8	15	0	3	5	10	60,000	51
School House	20	9	19	20	4	7	10	45,000	89
Mixon & Ass.	20	10	20	20	5	10	10	30,000	95

Selection Committee Signatures:

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

BID NO.: BID NO. 302
PROJECT TITLE: LOBBYISTS - STATE

FIRM NAME	COMPETENCE 0-20	STAFFING & PROJECT MANAGEMENT EXPERIENCE 0-15	FEDERAL LOBBYING EXPERIENCE 0-20	FINANCIAL RESPONSIBILITY 0-20	UNIQUE ATTRIBUTES 0-5	APPROACH AND WORK PLAN 0-10	ACCEPTANCE OF CONTRACT TERMS 0-10		TOTAL: 100
Home Group ²⁹	10	5	5	0	1	5	1	4,000	27
Emergent Design ¹⁰	15	15	14	10	3	10	3	2,400 plus	70
Meyers & Assoc. ¹⁹	18	10	15	18	3	10	5	36,000 billable 3000	79
School House ¹²	15	10	15	16	3	8	5	45,000	72
Colodney ³⁶	8	8	10	0	3	6	1	5,000	36
FL School ¹³	15	9	15	15	4	9	6	42,000 30,000	73

Selection Committee Signatures:

Martha Alfonso
Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Signature

Did not submit
Signature